Forest Legacy Information System

(FLIS 2.0)

Users Guide

Version 1.2

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USDA Forest Service
National Information Center for State & Private Forestry

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Document History

Name	Date	Description	Version
David Wilson	07/23/2012	First Draft	1.0
Kevin Hoffman	8/1/2012	Second Draft	1.1
Kevin Hoffman	8/22/2012	Third Draft (Regional-level functions)	1.2

1. Introduction

1.1. Summary

The Forest Legacy Information System v2.0 (FLIS2.0) is a new version of an existing system. FLIS2.0 enhances the relationships between tracts and projects to more accurately reflect the reality of the actual Forest Legacy Program. FLIS2.0 also extends the system to monitor and document the Forest Legacy process from the initial draft stage to the final approval – a process that involves Organizational, State, Regional, and National users.

The system also provides information archives at various points as Projects/Tracts advance in status. FLIS2.0 provides tools to follow the process from initiation to conclusion, cataloguing historical reports for Projects/Tracts as they advance through the system.

1.1.1. *System Interface*

Users of the Forest Legacy Information System are authenticated and managed through the National Information Center [NIC] Portal. The NIC Portal is an application that handles all FLIS2.0 user administration (i.e. requesting and granting of accounts as well as user authentication). The NIC Portal is also the source of organization information (including organizational hierarchy). The system uses information provided by the NIC Portal to determine the "type" of the user – either National, Regional or State/Organizational. Depending on a user's role (State/Org, Regional, or National), the system will display the appropriate homepage with the assigned read/write permissions.

1.2. Key Functionality

The major functions of the Forest Legacy Information System (FLIS) are to:

- Provide state and organizational users the ability to create/update information for Tracts that are identified as possible candidates for the Forest Legacy Program, and to associate various Tracts with Projects.
- Allow state users to submit Projects for review and approval.
- Provide functionality for Regional users to identify, select, and submit projects/tracts for funding.
- Give Regional and National users the authority to review and modify projects/tracts within their respective regions.
- Allow Monitors to enter reports for Conservation Easement tracts.

1.3. Operating Environment

The user interface is designed to support Netscape 6 and above and Microsoft Internet Explorer 5.5 – 8.0. The interface will be based on the HTML 4 standard. **JavaScript must be enabled** to allow advanced functionality to operate.

2. The FLIS2.0 Funding Process (Program Workflow)

2.1. General Summary

All Projects and Tracts entered into the FLIS2.0 application must advance through a series of checkpoints in order to receive funding. These checks represent a stopping point for State, Regional, and National users to inspect and verify the information entered into the system is accurate and current. Following each checkpoint, the status of the Project (and its assigned Tracts) will advance to the next stage. Checkpoints exist at all different levels of the organizational hierarchy within the FLIS2.0 application (National, Regional, and State). Below is a list of the various checkpoints that comprise the FLIS funding workflow, from the first status (Draft) to the final status (Approved – Completed).

2.2. Project / Tract Checkpoints and Status Descriptions

2.2.1. **Draft –** Initial data-entry stage for Projects and Tracts; this occurs at the state level.

2.2.2. **Ranked –** Once the information for Projects and Tracts has been entered into the system, and verified as complete and accurate, a user ranks Projects (and their assigned Tracts) according to desire and favorability; this occurs at the state level.

2.2.3. **Submitted to Region –** After the user community of a given state has identified and ranked various Projects/Tracts as intended for funding for a fiscal year, a user formally submits the Projects/Tracts to the Regional manager for approval; this submission occurs at the state level.

2.2.4. **Submitted for Funding –** The Regional manager reviews ranked Projects/Tracts as they are submitted from the state level. If the Regional manager agrees the information is complete, and that the Projects/Tracts should be considered for funding during a given fiscal year's cycle, he/she will submit the Projects/Tracts to the National level for information archive. Once the Regional manager submits the records to the National level, the submitted Projects' and Tracts' information is locked from editing.

2.2.5. **Submitted for Funding, Archived –** A National-level user verifies the submitted Projects/Tracts are ready to be considered for funding by the national Forest Legacy panel. The National-level user archives the records, providing a snapshot of the Project/Tract information at that point in time (these records are accessible through the Project Brief (Archive) section of the application – see section 6.2). Once the archive is captured, the submitted Projects' and Tracts' information becomes unlocked/editable.

2.2.6. **President's Request –** The executive branch reviews the list of Projects/Tracts submitted for funding. From these options, the President's Administration selects a list of Project/Tracts they intend to fund. Once this list is disseminated, Regional-level users use the FLIS2.0 application to identify and rank these Projects/Tracts as President's Request. Following this identification/ranking, these Projects' and Tracts' information becomes locked from editing.

2.2.7. **President's Request, Archived – A** National-level user reviews the Projects and Tracts submitted as 'President's Request' by the Regional managers. Following review, the National-level user produces an information archive of the President's Request Projects/Tracts; this information then becomes unlocked/editable.

2.2.8. **Funded –** As Congress and the executive branch merge spending plans, the list of Projects and Tracts intended for funding evolves. Occasionally, Projects/Tracts may be added to the list, though more often, the list is narrowed down to a select group of Projects/Tracts for which there are funds available. It is the responsibility of the Regional managers to identify in the FLIS2.0 application these Project/Tracts as 'Funded'.

2.2.9. **Funded, Archived –** National-level users review the Projects/Tracts identified as 'Funded' by the Regional managers. If the information is accurate and current, the National user captures an information archive of the Projects' and Tracts' that were identified as 'Funded'. Once this archive is created, these Projects' and Tracts' information becomes unlocked/editable.

2.2.10. **Closed / Dropped –** Once funds are made available, the final deals for tract acquisition are made between the agency and landowners. At the state level, a 'Funded' tract needs to be identified as 'Closed' once the land deal is consummated. If, for some reason, funds were made available but the land deal was not finalized, the tract needs to be identified as 'Dropped' in the application.

2.2.11. **Approved / Completed –** This is the final status in the FLIS2.0 application. After a tract is certified as 'Closed', a Regional manager must lock the record from further editing (given that, following a land deal, no further edits of the tract information should be necessary). The record is locked once the Regional manager identifies the tract as 'Approved/Completed'. Alternatively, should the Regional manager see inaccuracies in the information, he/she can 'Reject' the record; this will revert the tract's status back to 'Funded, Archived', allowing the necessary edits to be made before re-submitting the record as 'Closed'.

3. Getting Started

3.1. Request NIC User Account

Note: You may want to bookmark NIC Portal, or add this location to your Favorites.

1.) Navigate to the National Information Center Portal by entering the following URL (Universal Resource Locator) into your browser: http://spfnic.fs.fed.us/nicportal/
2.) From the “Welcome to the NIC Portal” portlet on the right, click on the ‘Create an Account’ link.
3.) On the Create Account page, enter all required information and indicate which NIC Portal system(s) you are requesting access to, along with the role (data entry or read only) that you will need (see **Figure 1**).

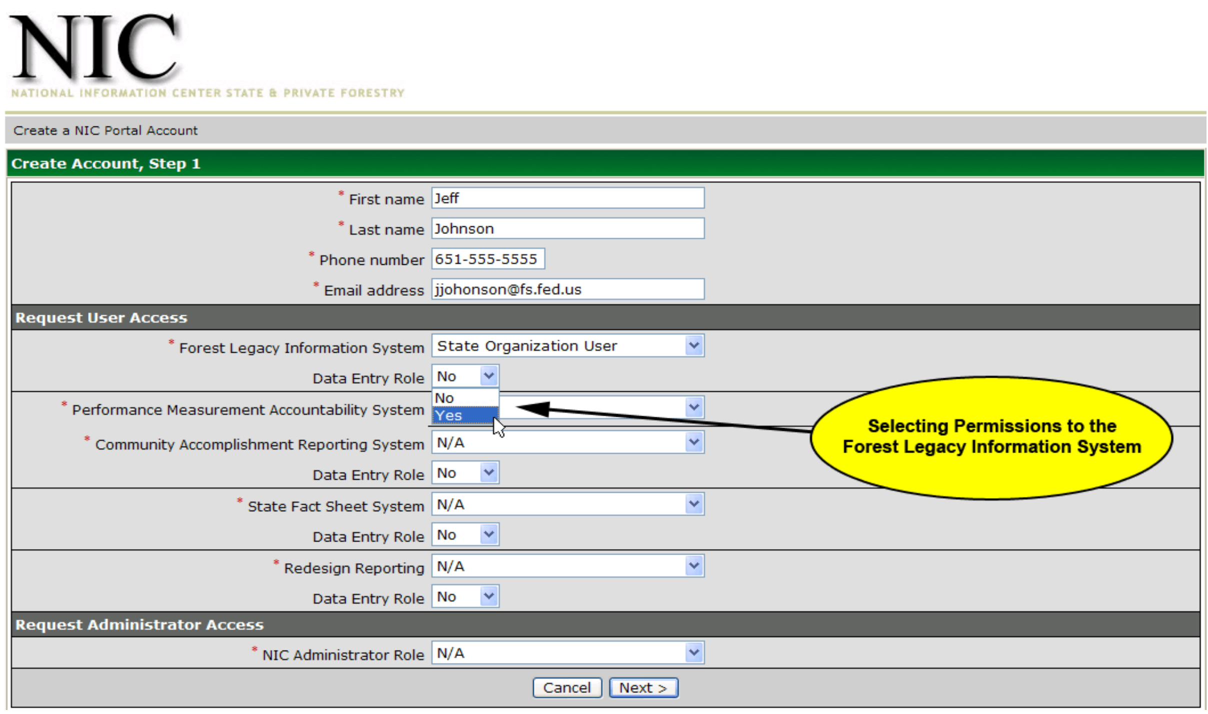


Figure 1 – Selecting NIC Account Settings and Application Permissions

4.) Click the ‘Next’ button to review your account information.
5.) When you are sure that all of the information you have entered is correct, click the ‘Submit’ button to request a User Account.
6.) Once your request has been approved, you should receive an email notification with an account activation code. After activating your account, you will be asked to provide an account password.

3.2. Request Forgotten Password

In the event that you have forgotten your password to NIC Portal, you can regain access to your account by resetting the account password. Follow the steps below to reset your account password:

1.) Navigate to the National Information Center Portal by entering the following URL (Universal Resource Locator) into your browser: http://spfnic.fs.fed.us/nicportal/
2.) From the "Welcome to the NIC Portal" portlet on the right, click on the 'reset your account password' link.
3.) Enter your Account ID and email address on the "Reset Account Password" page. Click the 'Submit' button.

The "Account Password Reset" page will be displayed confirming that your request has been submitted. You should receive an email notification with an account activation code within 2 hours. After activating your account, you will be asked to provide your new account password.

3.3. Logging in to the FLIS2.0 Application

Note: You must have a NIC user account to login to the Forest Legacy Information System. If do not have an Account, see section

1.) Navigate to the National Information Center Portal by entering the following URL (Universal Resource Locator) into your browser: http://spfnic.fs.fed.us/nicportal/
2.) Enter your Username and Password, and click the 'Login' button.
3.) Once you have gained access to your NIC Portal account, select the 'FLIS' link from the "NIC Applications" portlet (see **Figure 2**).

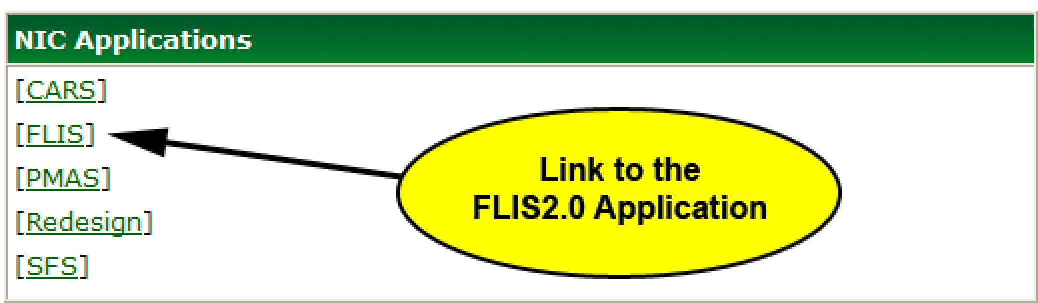


Figure 2 - The FLIS2.0 Application Link

4.) You should now be logged into FLIS2.0. The Homepage for your User Role should be displayed (State, Regional, or National).

3.4. Navigation

3.4.1. Quick Links Menu

The Quick Links menu contains a set of menu links to key areas and functions within FLIS; these links vary as the user moves throughout the State, Regional, and National levels (see the State-level Quick Links - **Figure 3**). These links include:

- **Admin** – Links to user and program contacts information, as well as system notice subscriptions.
- **Help** – Same for all users; links to the system help.
- **Home** – This is the user's homepage, and is displayed upon entering the FLIS 2.0 application.
- **Logout** – Logs user out of the FLIS2.0 application and directs them to the NIC Portal.
- **Monitoring** – Displayed at the State level; links to the Monitoring page within a state. This is where users submit Monitoring reports.
- **Program** – Displayed at the National and Regional levels; links to the Program page, from which Projects/Tracts are advanced in status and archived.
- **Projects** – Displayed at the State level; links to pages with Project information.
- **Reports** – Displayed at the State level; links to detailed and brief reports pages.
- **Tracts** – Displayed at the State level; links to pages with Tract information.

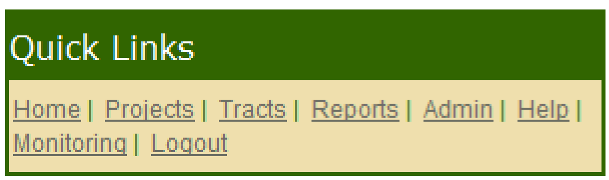


Figure 3 - The State-level Quick Links Menu

3.4.2. Accessing Different Regions/States (Organizational Breadcrumb Hyperlinks)

The FLIS2.0 application displays an organizational hierarchy on all pages, with hyperlinks to National, Regional, and State levels throughout the system (see the State-level breadcrumb - **Figure 4**).

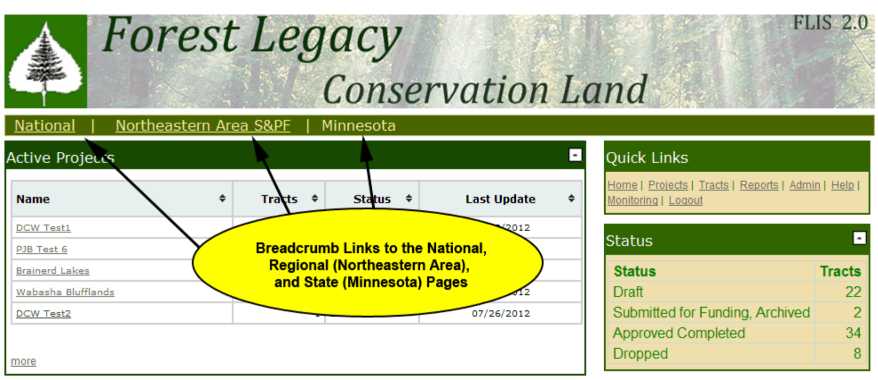


Figure 4 - The State-level Breadcrumb Links

Using the Organizational Breadcrumb, users can access other Regions and States. State pages are linked through their respective Regions, and Regional pages are linked through the National page.

National Breadcrumb: This links to the topmost level in the organizational hierarchy. Regional homepages are linked through the National homepage. To access a Regional homepage, a user must first navigate to the National homepage.

Regional Breadcrumb: This links to the intermediate level in the organizational hierarchy; this is the homepage for Regional-level users. Users navigate to state homepages through the Regional level (see **Figure 5**).

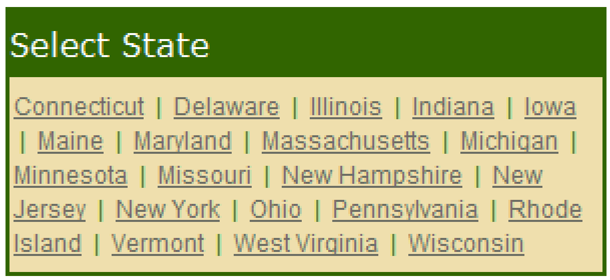


Figure 5 - State Links from the Northeastern Area's Regional Homepage.

State Breadcrumb: This is the lowest level of the organizational hierarchy. Most data-entry occurs within the State-level scope. State homepages are accessible through their respective Region's homepage.

3.5. User Roles

Various roles are defined for different users of FLIS 2.0. These roles are specific to different functions that need to be accomplished at National, Regional, State, and Organizational levels.

3.5.1. National System Administrator

The National System Administrator is a person who has the responsibility for maintaining the Forest Legacy Information System.

3.5.2. National User

A National user is a member of the USDA Forest Service with national responsibilities. A National User has access to all regions and states. A National User may complete, review and approve Project and Tract Information. A National User has read access any Tract or Project, regardless of its status. National users' primary responsibility is to archive Project/Tract information as it progresses through the Legacy funding process.

3.5.3. ***Regional User***

A Regional User is a member of the USDA Forest Service who has program oversight responsibilities. A Regional User has access to all states within the region and may complete, review and approve these states' Projects and/or Tracts. A Regional user has read access any Tract or Project, regardless of its status. The NIC Portal supports regional users that have access to more than one region. (This additional access is requested through the NIC Portal.)

3.5.4. ***State User***

A State User is a member of a state forestry organization who identifies, enters and completes tract information for Projects/Tracts within their state. A State user can identify, create and edit projects, as well as associate tracts with projects. The NIC Portal supports State-level users that have access to more than one state. (This additional access is requested through the NIC Portal.)

3.5.5. ***State Monitor***

A State Monitor is a State level user whose primary function within the FLIS2.0 application is to report monitoring activity for 'conservation easement' tracts. State Monitors write/edit access is limited to monitoring reports for their state. All other functionality within the FLIS application is limited to read-only for State Monitor Users.

3.5.6. ***Organizational User***

An Organizational User is a member of a FLIS-involved organization who identifies and inputs tract information for Projects/Tracts associated with their organization. In addition, an organizational user can identify, create and edit projects, as well as associate tracts with different projects.

3.5.7. ***Organizational Monitor***

An Organizational Monitor is an Organizational-level user whose primary function within FLIS2.0 is to report monitoring activity for 'conservation easement' tracts. Organizational Monitors write/edit access is limited to monitoring reports associated with their organization. All other functionality within the FLIS application is limited to read-only for Organizational Monitor Users.

3.6. Permissions

3.6.1. ***Read Permissions***

All users have read permissions for all Projects and Tracts within the system that have advanced beyond a status of 'Draft': National and Regional users have no restriction on read permissions (meaning, they can view information for all Projects/Tracts, including those with a status of 'Draft'). State users have read permissions for "Draft" Project/Tract profiles within their state, but not outside their state. Organization users may read Draft information for Project/Tracts associated with their organization, but not others.

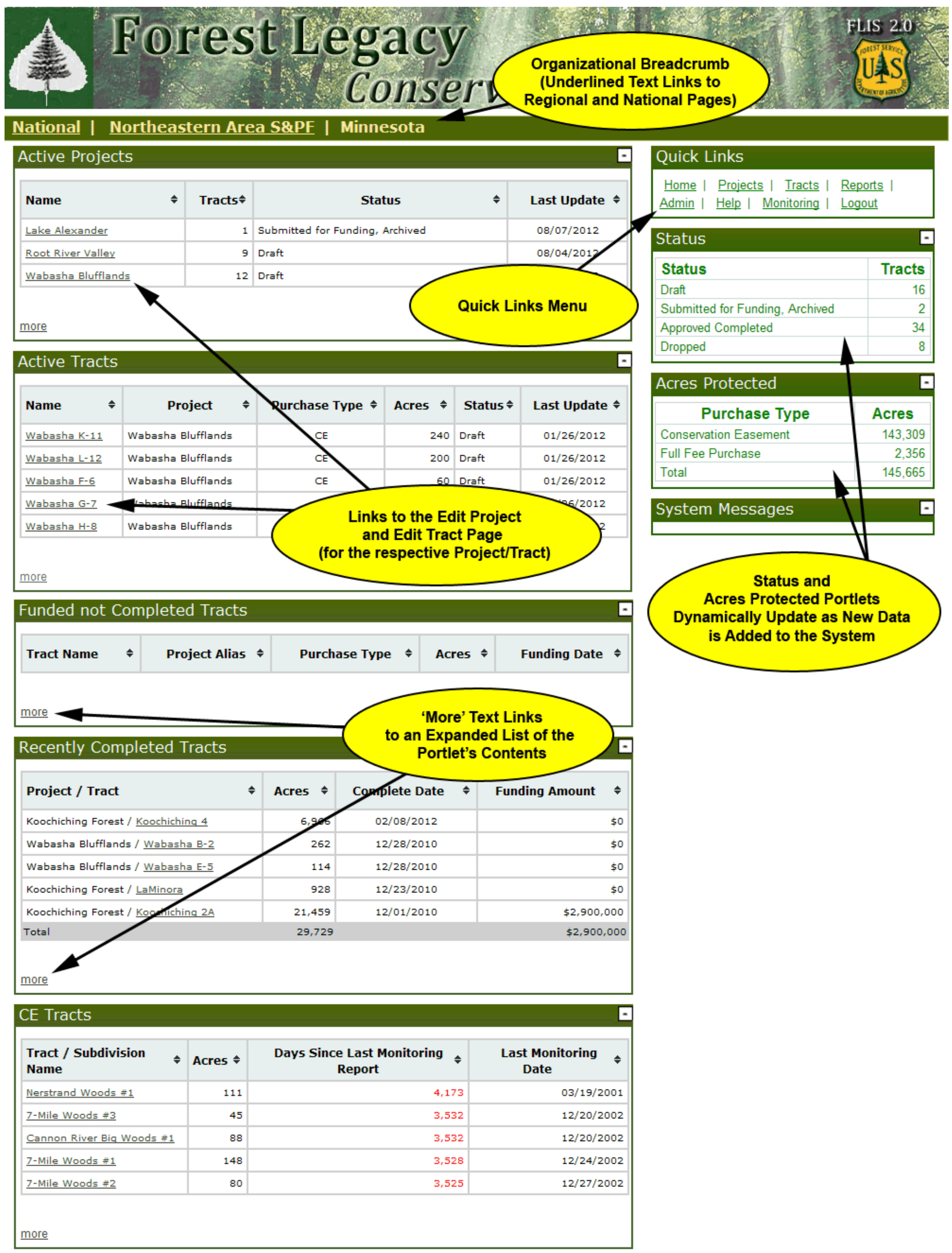
3.6.2. ***Data Entry Permissions***

Data entry permissions allow write access to the application's Tract and Project information. Data entry permissions are granted to State and Organizational Users and Monitors as appropriate to allow project formulation and reporting of tract monitoring activities. Data-entry permissions are also necessary to submit a Project/Tract to advance its status.

4. State Level Functions

4.1. The State-Level homepage

Below is a graphic of the State-Level homepage (in this example, Minnesota's homepage). Review the elements of the graphic to familiarize yourself with the State homepage.



4.2. Add/Edit Forest Legacy Information

While certain oversight and approval tasks must be completed at the Regional or National level, data-entry for specific projects and tracts occurs at the State level.

4.2.1. Add/Edit Project Information

4.2.1.1. Selecting an Existing Project to View or Edit / Adding a New Project

1.) From the State Homepage, click on the ‘Projects’ link from the Quick Links menu.
2.) Selecting/Adding a Project (see **Figure 6**).
    a. If adding a new Forest Legacy Project, select the ‘Add Project’ link from the Project Menu portlet.
    b. If editing an existing Forest Legacy Project, select your project by name from the table in the Project list.

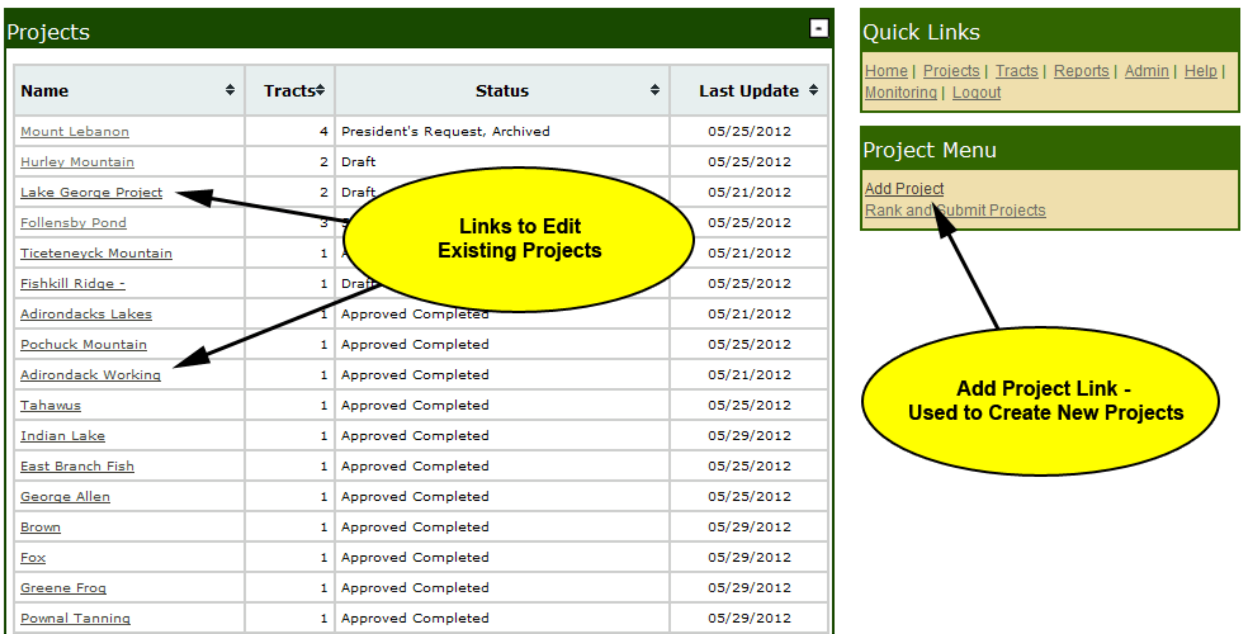


Figure 6 - Projects Page Links

4.2.1.2. Edit Project Page Tabs

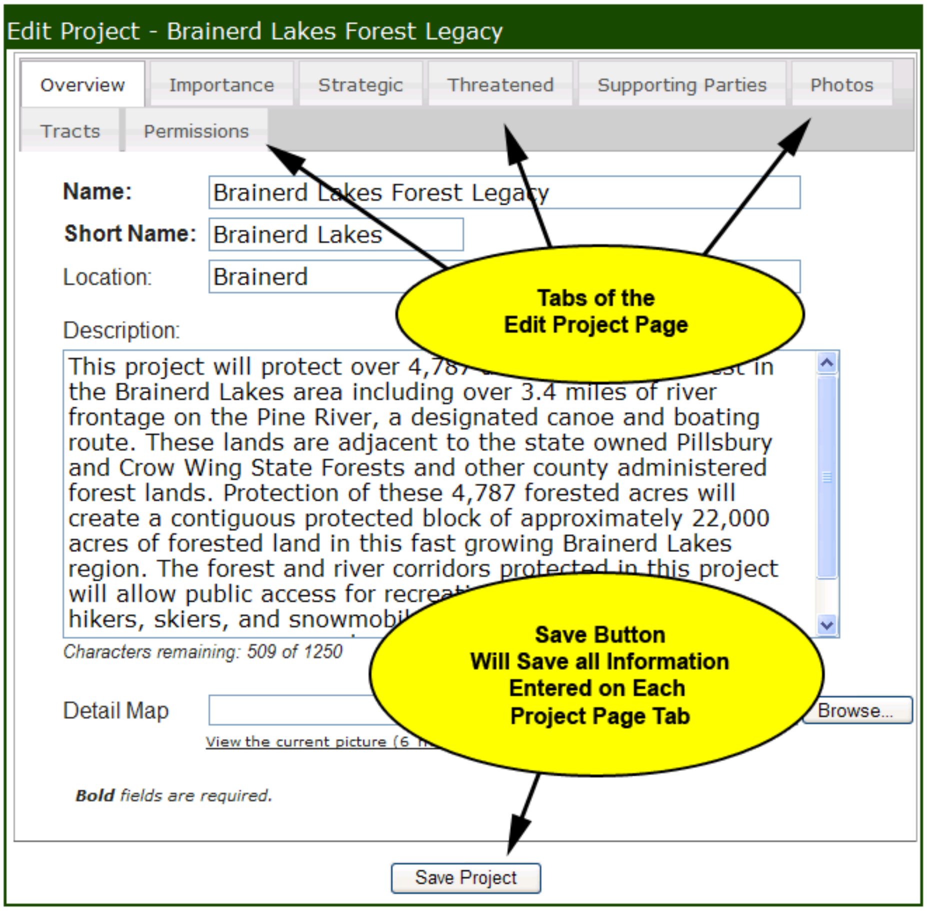


Figure 7 - The Edit Project page Tabs

The Edit Project page is broken out into a series of tabs to improve usability (see **Figure 7).** Each tab represents a different part of the same Edit Project page. A user may navigate among the different tabs without saving information. However, if a user navigates away from the tabs of the Edit Project page (such as clicking a Quick Links link), the user will be asked to save information; if the user does not save, the information entered while visiting the page will be lost.

4.2.1.3. Project Overview

1.) By default, when a user selects a Project from the Project list (this list is shown in **Figure 6**), or selects to add a new Project, the Project-Overview page is displayed. In the Project – Overview tab, begin adding/editing general information about your project.
   a. "Name" and "Short Name" are required fields. These fields identify your project within your state.
   b. "Location", "Description", and "Detail Map" are optional fields, and are not required to save the Project's information.

2.) Click the 'Save Project' button to store your project information in the FLIS2.0 application.
   a. If any required fields have been omitted, the Project information will not be saved, and a list of issues to be corrected will be displayed at the top of the Edit Project page.

4.2.1.4. Project – Importance

Project – Importance is limited to 20 items in the FLIS2.0 system. Each Importance item is limited to 300 characters.

1.) Within the Project page (see section 4.2.1.1), select the Importance tab.
   a. To add a new Importance item, click on the 'Add' button at the bottom of the Importance tab. A text entry form will be displayed, allowing the user to Add/Edit the text of a new Importance item. After all text has been added, click the OK button to commit the entered information to a temporary array of Project data stored in local memory; the information is not yet permanently saved to the FLIS2.0 application (see Step 3). You will then be returned to the updated Project – Importance tab.

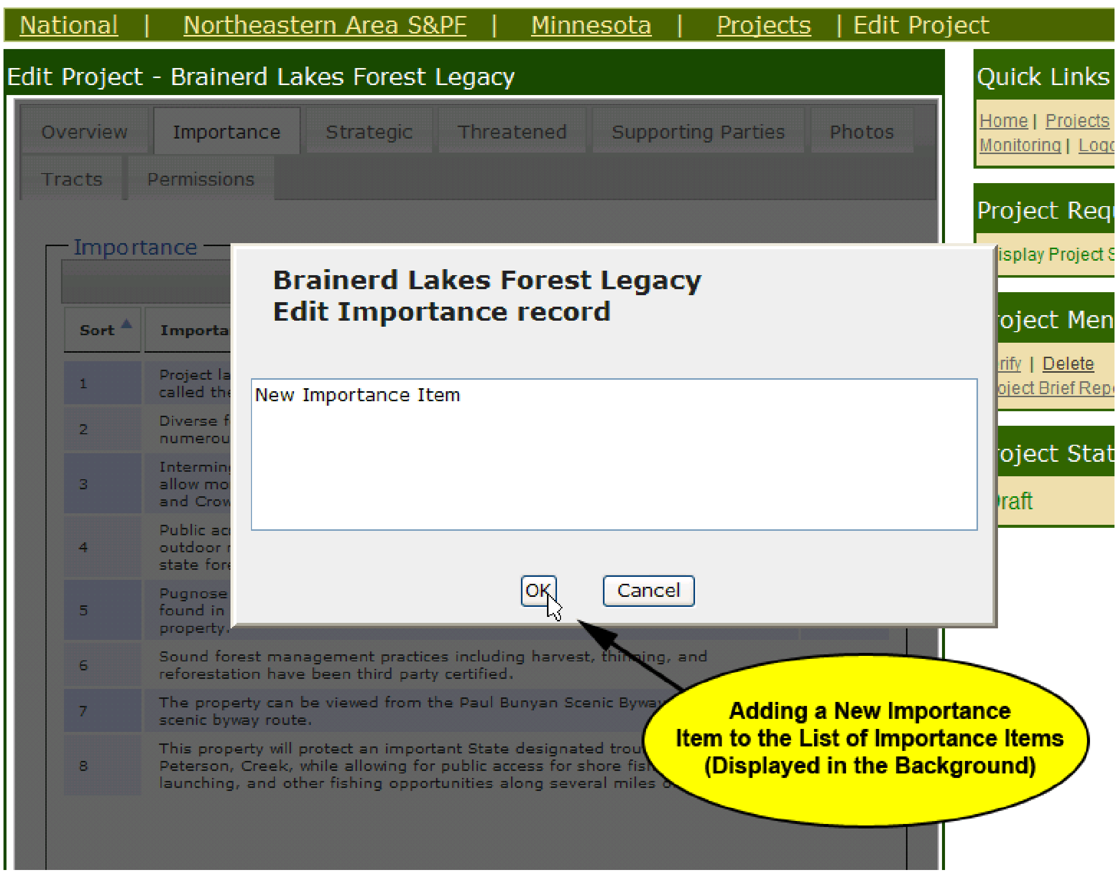


Figure 8 - Adding a new Importance Item

   b. To edit an existing Importance record, select the desired record from the displayed list, and click on the "Edit" button. A text entry form will be displayed, allowing the user to edit the text of the selected Importance item. After all edits have been made, click the OK button to commit the entered information to a temporary array of Project data stored in local memory; the information is not yet permanently saved to the FLIS2.0 application (see Step 3). You will then be returned to the updated Project – Importance tab.

2.) If necessary, re-order the Importance items by using the 'Up' and 'Down' buttons.
3.) Click the 'Save Project' button to store your project information in the FLIS2.0 application.
    a. If any required fields have been omitted, the Project information will not be saved, and a list of issues to be corrected will be displayed at the top of the Edit Project page.

4.2.1.5. Project – Strategic

Project – Strategic is limited to 10 items in the FLIS2.0 system. Each Strategic item is limited to 400 characters.

1.) Within the Project page (see section 4.2.1.1), select the Strategic tab.
    a. To add a new Strategic item, click on the 'Add' button at the bottom of the Strategic tab. A text entry form will be displayed, allowing the user to Add/Edit the text of a new Strategic item. After all text has been added, click the OK button to commit the entered information to a temporary array of Project data stored in local memory; the information is not yet permanently saved to the FLIS2.0 application (see Step 3). You will then be returned to the updated Project – Strategic tab.
    b. To edit an existing Strategic record, select the desired record from the displayed list, and click on the "Edit" button. A text entry form will be displayed, allowing the user to Edit the text of the selected Strategic item. After all edits have been made, click the OK button to commit the entered information to a temporary array of Project data stored in local memory. You will then be returned to the updated Project – Strategic tab.
2.) If necessary, re-order the Strategic items by using the 'Up' and 'Down' buttons.
3.) Click the 'Save Project' button to store your project information in the FLIS2.0 application.
    a. If any required fields have been omitted, the Project information will not be saved, and a list of issues to be corrected will be displayed at the top of the Edit Project page.

4.2.1.6. Project – Threatened

Project – Threatened is limited to 10 items in the FLIS2.0 system. Each Threatened item is limited to 300 characters.

1.) Within the Project page (see section 4.2.1.1), select the Threatened tab.
    a. To add a new Threatened item, click on the 'Add' button at the bottom of the Threatened tab. A text entry form will be displayed, allowing the user to Add/Edit the text of a new Threatened item. After all text has been added, click the OK button to commit the entered information to a temporary array of Project data stored in local memory; the information is not yet permanently saved to the FLIS2.0 application (see Step 3). You will then be returned to the updated Project – Threatened tab.

b. To edit an existing Threatened record, select the desired record from the displayed list, and click on the 'Edit' button. A text entry form will be displayed, allowing the user to edit the text of the selected Threatened item. After all edits have been made, click the OK button to commit the entered information to a temporary array of Project data stored in local memory. You will then be returned to the updated Project – Threatened tab.

2.) If necessary, re-order the Strategic items by using the 'Up' and 'Down' buttons.
3.) Click the 'Save Project' button to store your project information in the FLIS2.0 database.
   a. If any required fields have been omitted, the Project information will not be saved, and a list of issues to be corrected will be displayed at the top of the Project-Overview tab.

4.2.1.7. Project – Supporting Parties

At least 1 Project – Supporting Party is required in the FLIS2.0 system. Each Supporting Parties item is limited to 80 characters.

1.) Within the Project page (see section 4.2.1.1), select the Supporting Parties tab.
   a. To add a new Supporting Party, click on the 'Add' button at the bottom of the Supporting Parties tab. A text entry form will be displayed, allowing the user to Add/Edit the text of a new Supporting Parties item. After all text has been added, click the OK button to commit the entered information to a temporary array of Project data stored in local memory; the information is not yet permanently saved to the FLIS2.0 application (see Step 3). You will then be returned to the updated Project – Supporting Parties tab.
   b. To edit an existing Supporting Parties record, select the desired record from the displayed list, and click on the 'Edit' button. A text entry form will be displayed, allowing the user to edit the text of the selected Supporting Parties item. After all edits have been made, click the OK button to commit the entered information to a temporary array of Project data stored in local memory. You will then be returned to the updated Project – Supporting Parties tab.
2.) If necessary, re-order the Supporting Parties items by using the 'Up' and 'Down' buttons.
3.) Click the 'Save Project' button to store your project information in the FLIS2.0 application.
   a. If any required fields have been omitted, the Project information will not be saved, and a list of issues to be corrected will be displayed at the top of the Project-Overview tab.

4.2.1.8. Project – Photos

Each Project has a limit of 4 photos in the FLIS2.0 system.

1.) Within the Project page (see section 4.2.1.1), select the Photos tab.
   a. To add a new Photo, click on the 'Add' button at the bottom of the Photos tab. A form will be displayed (see **Figure 9**), allowing the user to browse for a photo on their local computer. In the Edit Photo Record form, text may also be entered to provide a photo caption and photo credit. After all desired information has been added, click the OK button to commit the entered information to a temporary array of Project data stored

in local memory; the information is not yet permanently saved to the FLIS2.0 application (see Step 3). You will then be returned to the updated Project – Photos tab.

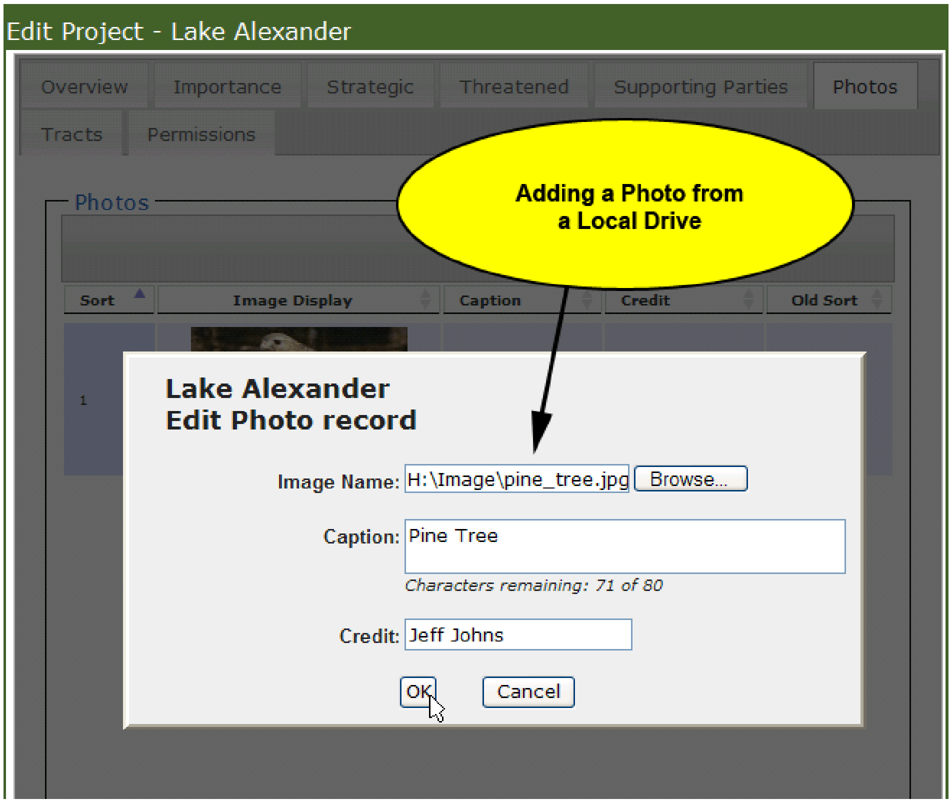


Figure 9 - Adding a Photo to a Project's Record

b. To edit an existing Photos record, select the desired record from the displayed list, and click on the 'Edit' button. A form will be displayed, allowing the user to browse for a photo on their local computer. In the Edit Photo Record form, photo caption and credit text may also be edited. After all desired changes have been made, click the OK button to commit the entered information to a temporary array of Project data stored in local memory; the information is not yet permanently saved to the FLIS2.0 application (see Step 3). You will then be returned to the updated Project – Photos tab.

2.) If necessary, re-order the Photos by using the 'Up' and 'Down' buttons.

3.) Click the 'Save Project' button to store your project information in the FLIS2.0 database.

a. If any required fields have been omitted, the Project information will not be saved, and a list of issues to be corrected will be displayed at the top of the Edit Project page.

4.2.1.9. Project – Tracts

Note: Projects can be assigned to many Tracts, but a Tract can only be assigned to one Project.

1.) Within the Project page (see section 4.2.1.1), select the Tracts tab.
    a. To assign a new Tract to the Project, click on the 'Add Existing Tract to Project' button at the bottom of the Tracts tab. A form will be displayed, allowing the user to browse a list existing tracts within their state. If the selected tract is already associated with a different Project, the user will be warned about breaking the existing Project-Tract assignment, as Tracts can only be assigned to one Project.

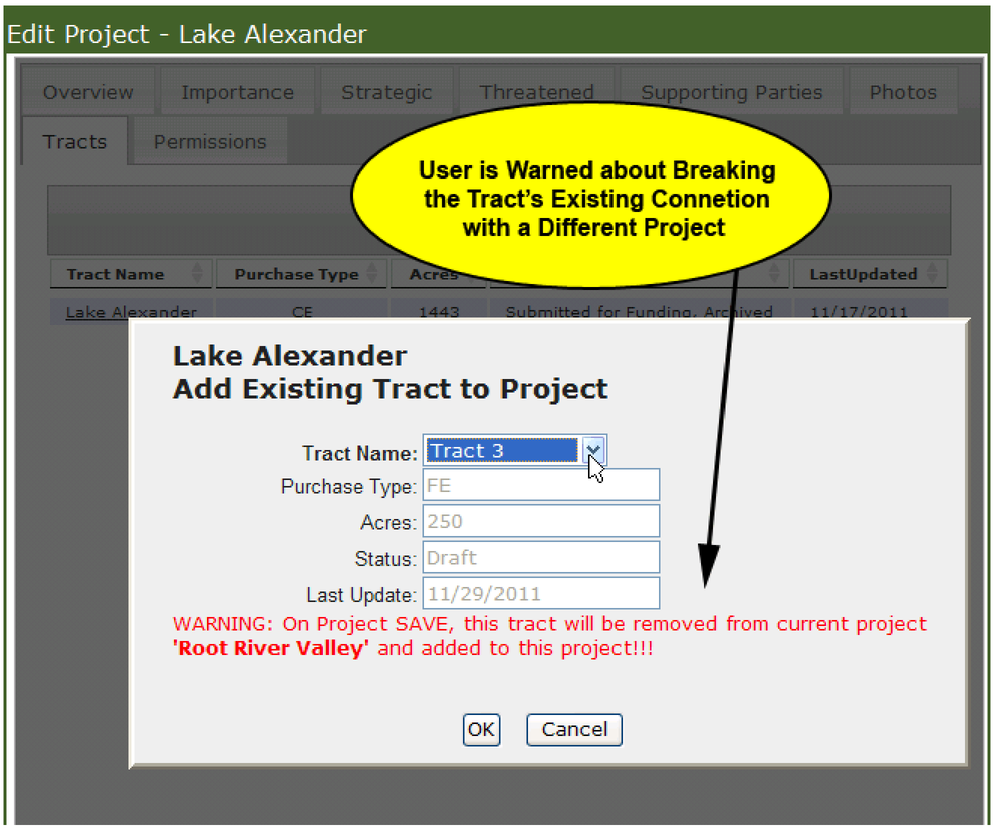


Figure 10 - Tract Reassignment Warning

    b. After a tract has been selected, click the OK button to commit the entered information to a temporary array of Project data stored in local memory; the information is not yet permanently saved to the FLIS2.0 application (see Step 2). You will then be returned to the updated Project – Tracts tab.
    c. To create a new Tract, select the 'Tracts' link from the Quick Links Menu, then click on the 'Add Tract' link from the Tract Menu (see Section 4.2.4.1).

2.) Click the 'Save Project' button to store your project information in the FLIS2.0 application.
    a. If any required fields have been omitted, the Project information will not be saved, and a list of issues to be corrected will be displayed at the top of the Edit Project portlet.

4.2.1.10. Project – Permissions

By default, the current user's organization is shown at the top of the list (it will be selected and grayed out; a Project must be associated with at least one state). The remainder of the Permissions list is composed of relevant state agencies and organizations with a presence in the Project's state, and each bordering state. If you do not see the organization to which you would like to grant permissions, contact the NIC Portal support desk for assistance.

1.) Within the Project page (see section 4.2.1.1), select the Permissions tab.
    a. To add or remove permissions to access/edit the active project, simply check or un-check the appropriate checkbox next to an organization's name.
2.) Click the 'Save Project' button to store your project information in the FLIS2.0 application.
    a. If any required fields have been omitted, the Project information will not be saved, and a list of issues to be corrected will be displayed at the top of the Edit Project page.

4.2.2. Verify Project Information is Ready for Submission

In order to submit a Project (and its assigned Tracts) for funding consideration, certain items of information must be present in the Project (and Tract) forms. To verify that all required information has been entered for the Project:

1.) Within the Project page (see section 4.2.1.1), click the 'Verify' link in the Project Menu portlet.
2.) A new page will pop up, displaying a summary of the Project's (and its assigned Tracts') completeness and a detailed list of issues needing attention; in some cases, a user will need to edit the accompanying Tract information, as well as any Project errors (. All of the issues identified in the Verify Project page must be addressed before a Project and its Tracts can be submitted to Regional managers for funding consideration.

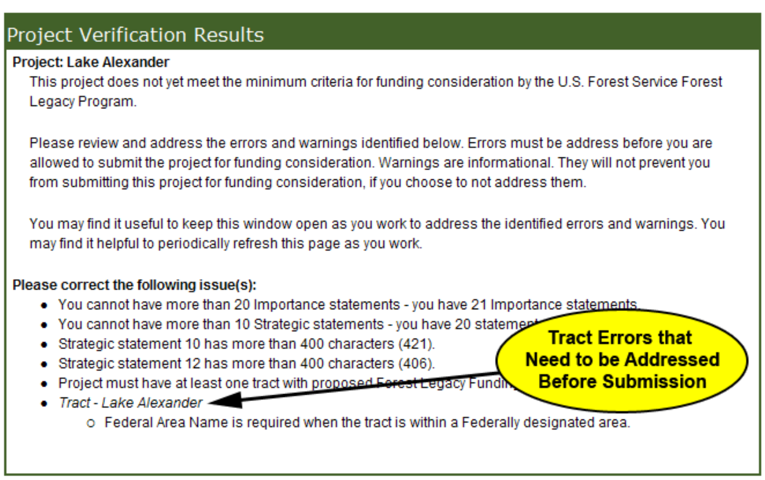


Figure 11 - The Verify Project Page

4.2.3. ***Delete Project***

1.) From the State Homepage, click on the 'Projects' link from the Quick Links menu.
2.) Select a Project from the list.
3.) In the Project Menu portlet, select the 'Delete' option.
4.) On the following page, select the 'Yes' option to confirm Project deletion.

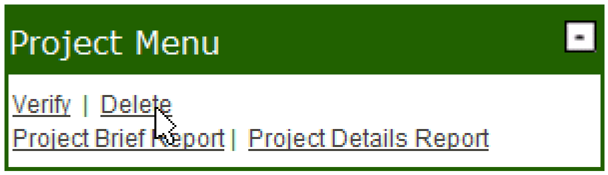


Figure 12 - The Project Menu Portlet (seen from within the Edit Project page).

4.2.4. ***Rank and Submit Project for Funding***

To receive Legacy funds, a Project (and its assigned Tracts) must advance in status through the FLIS2.0 application. The first step towards receiving funds (after the initial information drafting stage) is to submit the Project/Tracts to Regional managers for funding consideration. To do this, a Project and its Tracts must have all required information entered into the system (see section 4.2.2); a user can then Rank Projects and submit them to Regional managers for funding consideration. During a funding cycle, each Legacy-participating state is allowed to submit three Projects for funding consideration; each Project is given a rank of 1, 2, or 3, depending on desirability. The FLIS2.0 application does not require unique ranks for Projects (meaning, a state could submit three Projects with the same rank).

Note: A Project will only appear on the Rank and Submit page if it has an assigned Tract with a target funding year that matches the current funding cycle (that is, the year past the current fiscal year - see section 4.2.4.4).

1.) From the State Homepage, click on the 'Projects' link from the Quick Links menu.
2.) In the Project Menu portlet, select the 'Rank and Submit Projects' link.
3.) One the Rank and Submit page, expand the text of one Project intended for submission (see **Figure 13**).
    a. If Project intended for submission is displayed with errors (see **Figure 13**), correct these errors before proceeding.
    b. If the state does not intend to submit Projects/Tracts for funding consideration during the upcoming funding cycle, check the box next to "Not submitting projects for Funding Fiscal Year 2014".
4.) Enter the desired ranking in the Rank drop-down box.

5.) If necessary, expand the Tracts text; this will display a list of Tracts assigned to the Project with a set Funding Fiscal Year that matches the current funding cycle (see section 4.2.4.4). Using the Up and Down buttons, rank the Project's Tracts as desired (see **Figure 13**).

6.) Click the 'Save and Submit Ranked Projects' button to submit the Projects to the Regional manager for funding consideration.

   a. Alternatively, a user can save the ranks entered into the system, click the 'Save Ranked Projects' button, and return at a later time to submit the ranked Projects/Tracts to the Add/Edit Tract Information

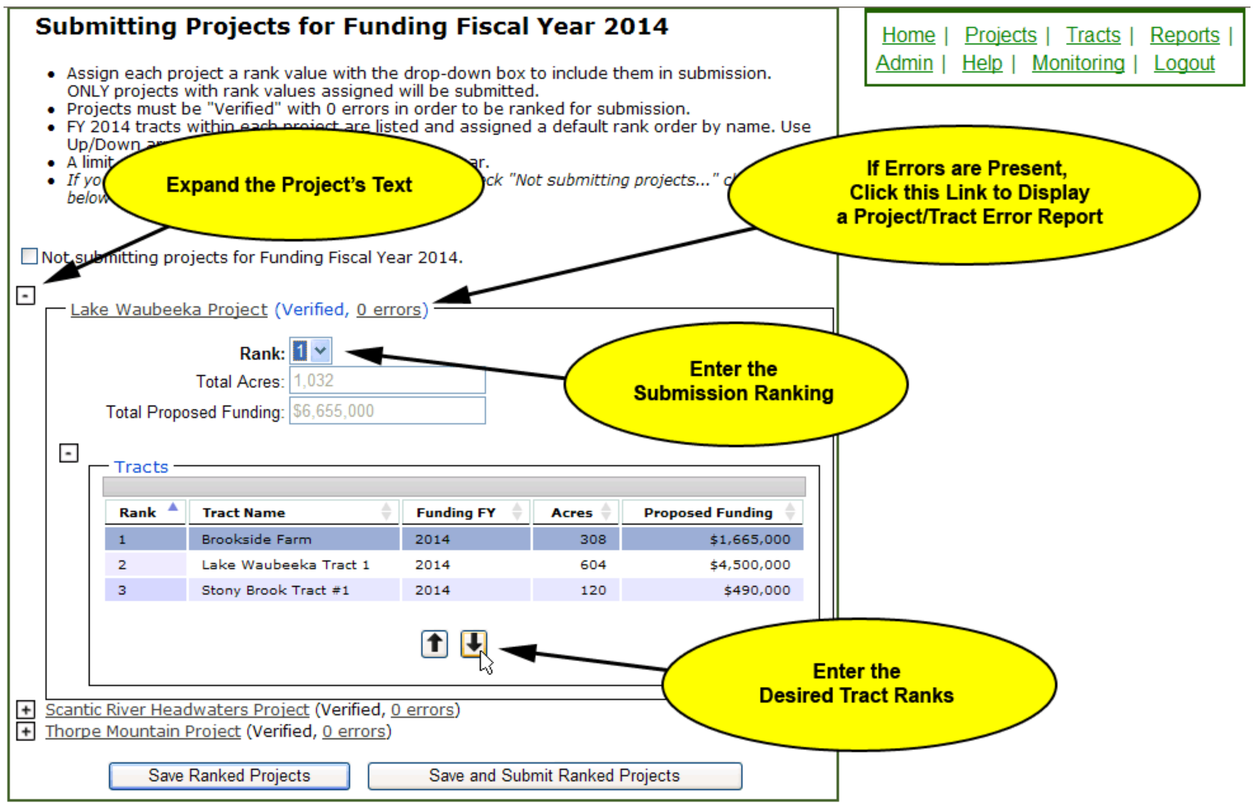


Figure 13 - The Rank and Submit Projects Page

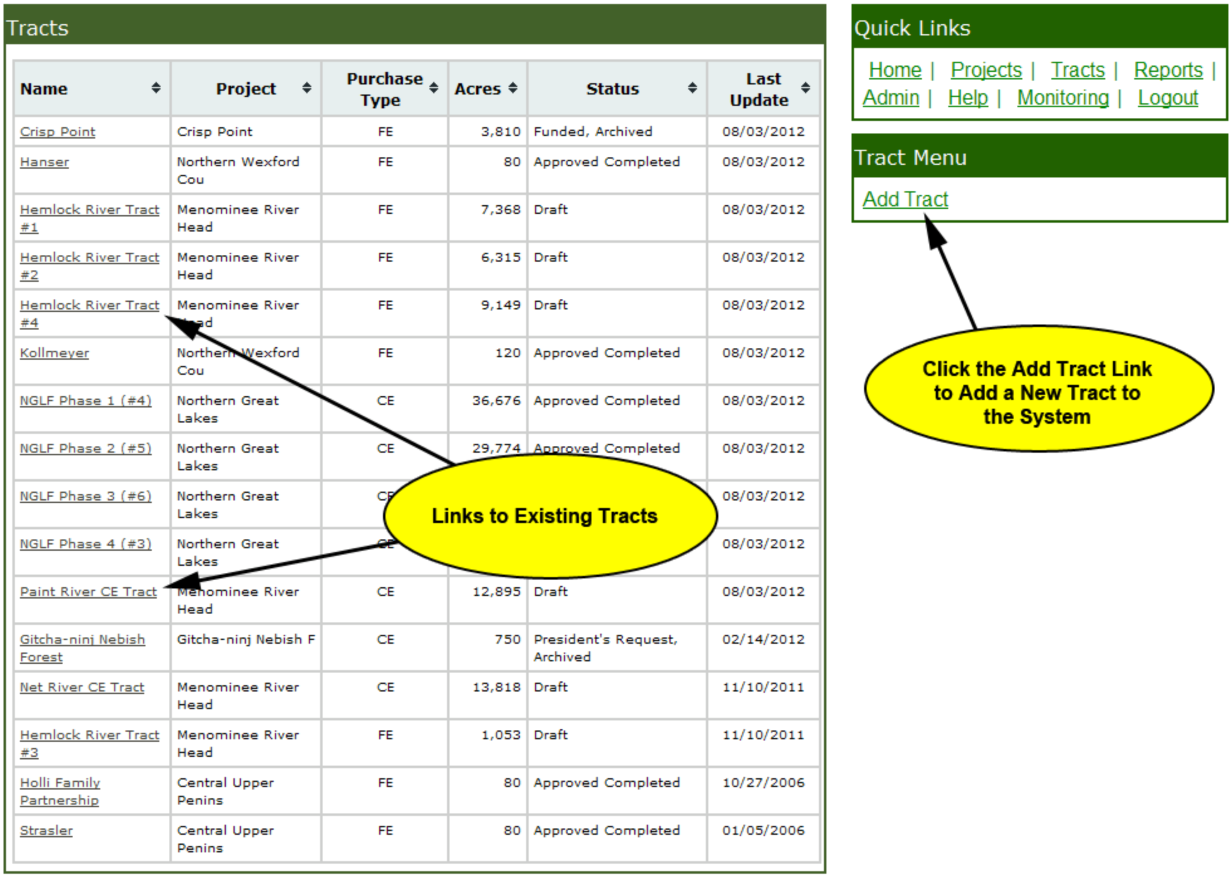
4.2.4.1. Selecting a Tract to View or Edit / Adding a New Tract

7.) From the State Homepage, click on the 'Tracts' link from the Quick Links menu.

8.) Selecting/Adding a Tract to edit (see).

   a. If adding a new Forest Legacy Tract, select the 'Add Tract' link from the Tract Menu.

   b. If editing an existing Forest Legacy Tract, select your Tract by name from the table in the main Tracts portlet.



Name	Project	Purchase Type	Acres	Status	Last Update
Crisp Point	Crisp Point	FE	3,810	Funded, Archived	08/03/2012
Hanser	Northern Wexford Cou	FE	80	Approved Completed	08/03/2012
Hemlock River Tract #1	Menominee River Head	FE	7,368	Draft	08/03/2012
Hemlock River Tract #2	Menominee River Head	FE	6,315	Draft	08/03/2012
Hemlock River Tract #4	Menominee River Head	FE	9,149	Draft	08/03/2012
Kollmeyer	Northern Wexford Cou	FE	120	Approved Completed	08/03/2012
NGLF Phase 1 (#4)	Northern Great Lakes	CE	36,676	Approved Completed	08/03/2012
NGLF Phase 2 (#5)	Northern Great Lakes	CE	29,774	Approved Completed	08/03/2012
NGLF Phase 3 (#6)	Northern Great Lakes	CE			08/03/2012
NGLF Phase 4 (#3)	Northern Great Lakes	CE			08/03/2012
Paint River CE Tract	Menominee River Head	CE	12,895	Draft	08/03/2012
Gitcha-ninj Nebish Forest	Gitcha-ninj Nebish F	CE	750	President's Request, Archived	02/14/2012
Net River CE Tract	Menominee River Head	CE	13,818	Draft	11/10/2011
Hemlock River Tract #3	Menominee River Head	FE	1,053	Draft	11/10/2011
Holli Family Partnership	Central Upper Penins	FE	80	Approved Completed	10/27/2006
Strasler	Central Upper Penins	FE	80	Approved Completed	01/05/2006

Figure 14 - The Tracts Page

4.2.4.2. Tract – General

Note: Like the Edit Project page, the Edit Tract page's setup is broken out into a series of tabs: General, Readiness, Funding, and Boundary. For an explanation of the tabbed implementation, and its implications for saving information, see section 4.2.1.2.

1.) By default, when a user selects a Tract from the Tract List, or adds a new Tract, the Tract-General page will display. In the Tract – General tab, begin adding/editing general information about your tract.

    a. "Tract Name" and "Project Name" are required fields. The "Project Name" field is comprised of a list of Project options; these are the Projects that have a presence in the state where you are creating the new tract. (Another required field is the "Funding Fiscal Year" on the Tract – Funding tab. All required information must be entered before the Tract can be saved.)

Note: A Tract can only be assigned to one Project, whereas a Project can be assigned to many Tracts.

    b. Additional information fields are optional at this time. This information can either be entered now, or the tract can be saved and edited further at a later time.

2.) After all required fields have been completed, click the 'Save Tract' button to store your tract information in the database.
    a. If any required fields have been omitted, the Tract information will not be saved, and a list of issues to be corrected will be displayed at the top of the Edit Tract page.

4.2.4.3. Tract – Readiness

Tract Readiness refers to the state of completion of several key dates related to the legal transfer of property rights and/or ownership. Although these items are not required in order to save a Tract to the FLIS2.0 application, they may be required for Tract Closing and Completion. Readiness items include: CE/Fee Agreement, Purchase Agreement, Title Search, Mineral Determination, Appraisal Review, and Stewardship Plan.

1.) Within the Edit Tract page (see section 4.2.4.1), select the Readiness tab.
2.) In the Tract – Readiness tab, select completion dates for the indicated Readiness items; users can click the calendar icon next to the text box to select a date.
3.) After all available completion dates have been entered, click the 'Save Tract' button to store your tract information in the FLIS2.0 application.
    a. If any required fields have been omitted, the Tract information will not be saved, and a list of issues to be corrected will be displayed at the top of the Edit Tract page.

4.2.4.4. Tract – Funding

1.) Within the Edit Tract page (see section 4.2.4.1),, select the Funding tab.
2.) In the Tract – Funding tab, under the Forest Legacy section, enter the intended fiscal year for funding (Funding Fiscal Year).
3.) Enter the funding amount to be requested from the Forest Legacy Program.
4.) Enter the Grant Number, if funds have been allocated through the Forest Legacy Program.
5.) Under the Non-Federal Cost Share section, select the 'Add' button to open a form allowing the user to Add/Edit Non-Federal Cost Share information. All fields are required.
    a. After all required information has been entered, click the "OK" button to commit the entered information to a temporary array of Tract data stored in local memory; the information is not yet permanently saved to the FLIS2.0 application (see Step 9).
    Note: A cost share of 25% of overall project cost is required for Forest Legacy funding.
6.) Under the Other Federal section, select the 'Add' button to open a form allowing the user to Add/Edit Other Federal cost share information. All fields are required.
    a. After all required information has been entered, click the 'OK' button to commit the entered information to a temporary array of Tract data stored in local memory; the information is not yet permanently saved to the FLIS2.0 application (see Step 9).
7.) To edit Non-Federal or Other Federal Cost Share information, select the desired record from the list and click on the 'Edit' button to open a form allowing the user to edit cost share information.

   a. When the desired changes have been made, click the 'OK' button to commit the entered information to a temporary array of Tract data stored in local memory; the information is not yet permanently saved to the FLIS2.0 application (see Step 9).

8.) Enter any notes related to funding or your organization's use of Forest Legacy Program funds in the Funding Notes text box.
9.) After all Funding information has been entered, click the 'Save Tract' button to store your tract information in the database.
   a. If any required fields have been omitted, the Tract information will not be saved, and a list of issues to be corrected will be displayed at the top of the Edit Tract page.

4.2.4.5. Tract – Boundary

FLIS2.0 has been upgraded to allow the submission of a shapefile outlining Forest Legacy Tract boundaries. This information is used to help generate the locator map displayed on the Project Brief report, and is also displayed for each tract in the Project Details report. The following steps apply to situations where a user is adding new boundary information to the Tract form, as well as situations where the user is overwriting existing boundary information:

1.) Within the Edit Tract page (see section 4.2.4.1),, select the Boundary tab.
2.) Verify that your shapefile is projected to the North American Datum 1983 (commonly known as 'NAD83'); ESRI ArcGIS Software may be required to verify projection information.
3.) Bundle all files associated with your tract boundary into a .zip file folder. *Only include those files which are part of the tract's shapefile* (at minimum .dbf, .prj, .shp, .shx). With the exception of the file extensions, all files associated with the shapefile must have the same name (i.e. shapefile.shp, shapefile.dbf, shapefile.prj, etc.).
4.) Click the "Browse" button to select your zipped shapefile from the local directory where your zipped shapefile is located.
5.) Click the 'Save Tract' button to save your Tract's boundary information. Please be patient as the system processes your request; shapefile uploads require longer processing times.

4.2.5. ***Delete Tract***

Note: Tracts may have a status that does not allow for deletion (for example, if a Tract's status is 'Funded, Archived', or if a Tract's record is locked from editing).

1.) Within the Edit Tract page, in Tract Menu portlet on the right-hand side of the screen, click the 'Delete Tract' link.
2.) A Delete Tract Confirmation page will be displayed.
3.) Click on the 'Yes' button to permanently delete the tract's information from the FLIS2.0 application.

4.2.6. ***Close Tract***

Note: A Tract can only be Closed if it has reached a status of "Funded, Archived".

When a Tract has advanced to the status of 'Funded', user can identify a Tract as 'Closed':

1.) Within the Edit Tract page (see section 4.2.4.1), select the 'Close Tract' option in the Tract Menu portlet (see **Figure 15**).

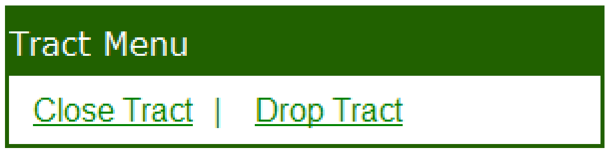


Figure 15 - The Close Tract and Drop Tract Options

2.) On the Verify Tract Information page, enter [at minimum] all required information.
3.) Check the 'I certify…' box at the bottom of the page; this is a required certification of information. A tract cannot be closed without this certification.
4.) Click the 'Close Tract' button.
    a. If any required fields have been omitted, the Tract will not be Closed, and a list of issues to be corrected will be provided at the top of the Verify Tract Information page.

4.2.7. ***Drop Tract***

Note: A Tract can only be Dropped if it has reached a status of "Funded, Archived".

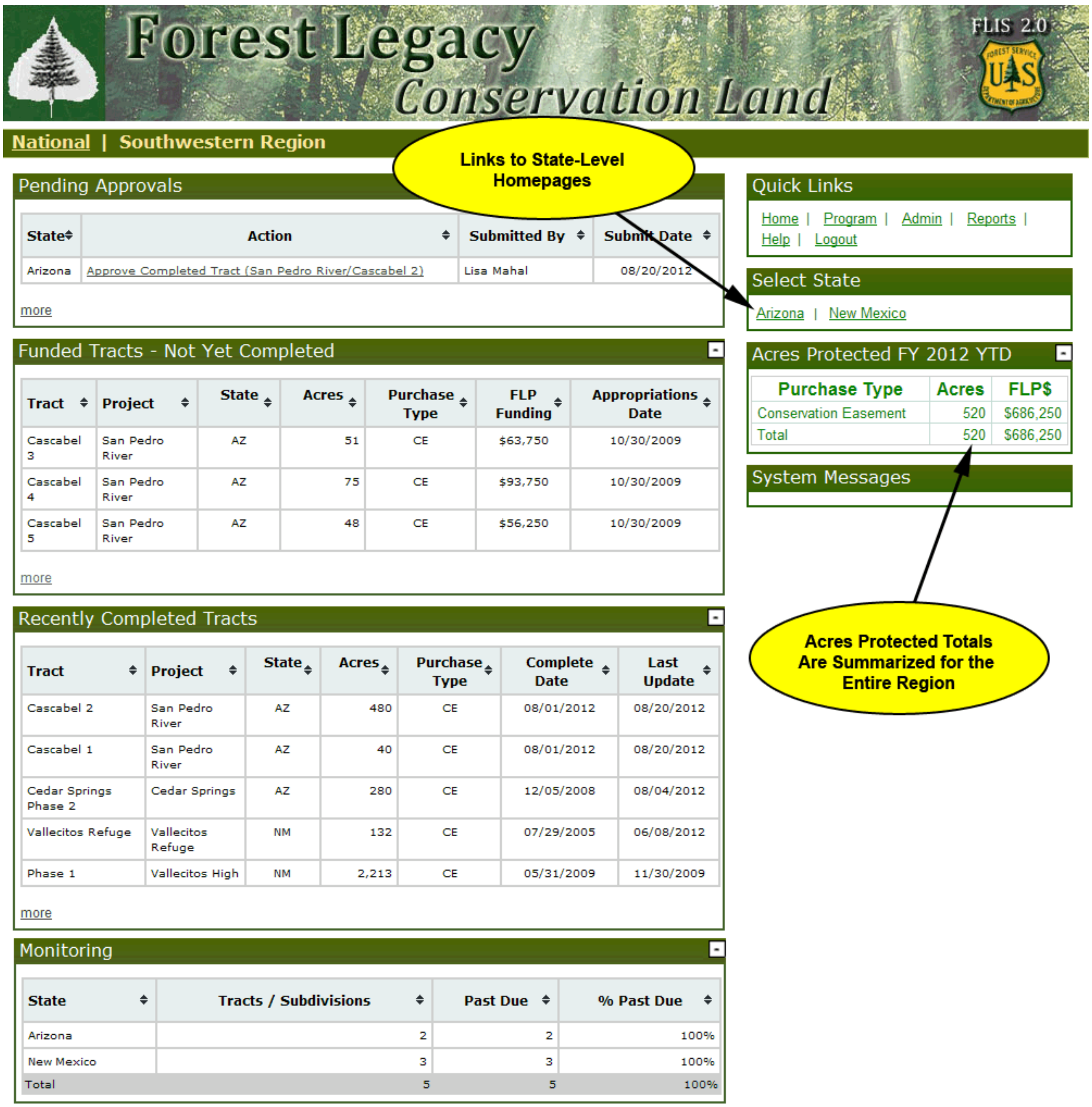
On occasion, tract acquisition deal cannot be made; this might be due to a variety of circumstances. In this event, the tract needs to be identified as 'Dropped'. When a Tract has advanced to the status of 'Funded', user can then identify a Tract as 'Dropped':

1.) Within the Edit Tract page(see section 4.2.4.1), select the 'Drop Tract' option in the Tract Menu portlet (see **Figure 15**).
2.) On the Drop Tract page, enter the appropriate information into the "Drop Date" and "Drop Reason" fields.
3.) Click the 'Drop Tract' button.

5. Regional-Level Functions

5.1. The Regional-Level Homepage

Below is a graphic of the Regional-Level homepage (in this example, the Southwestern Region's homepage). Review the elements of the graphic to familiarize yourself with the Regional homepage.



5.2. Program Duties

At various points during the Forest Legacy Program funding process, it is a Regional user's responsibility to verify data and submit information to National users for archival. Also, when a tract is deemed 'funded', it is the responsibility of the Regional user to grant final approval before funds can be exchanged.

5.2.1. Approve Completed Tracts

Note: A Tract can also be 'Rejected' by the Regional user. A rejection is warranted if the Regional user sees information on the Approve Completed Tract page that is inaccurate. If the Regional user 'rejects' the tract, the tract's status reverts to 'Funded, Archived' (see section 2.2). The tract can be re-submitted for Closure by the state user at another time.

1.) From the Regional Homepage, click on the 'Program' link from the Quick Links menu.
2.) On the Program Menu page, click the 'Pending Approvals' link.
3.) From the 'View All Pending Approvals' portlet, click the 'Approve Completed Tract [Tract Name]' link of the tract you wish to Close.
4.) Review the details of the Approve Completed Tract page; if necessary, make note of any information that requires editing.
    a. Also, click the 'Tract Boundary' tab to verify the accuracy of the tract's spatial information; it is not a requirement that tracts have associated spatial information.
5.) Click the 'Approve Completed Tract' button to approve the tract's final information.
    a. Alternatively, if any of the data is inaccurate, click the 'Reject Completed Tract' button; this will revert the tract's status back to 'Funded, Archived' (this status permits editing of data).

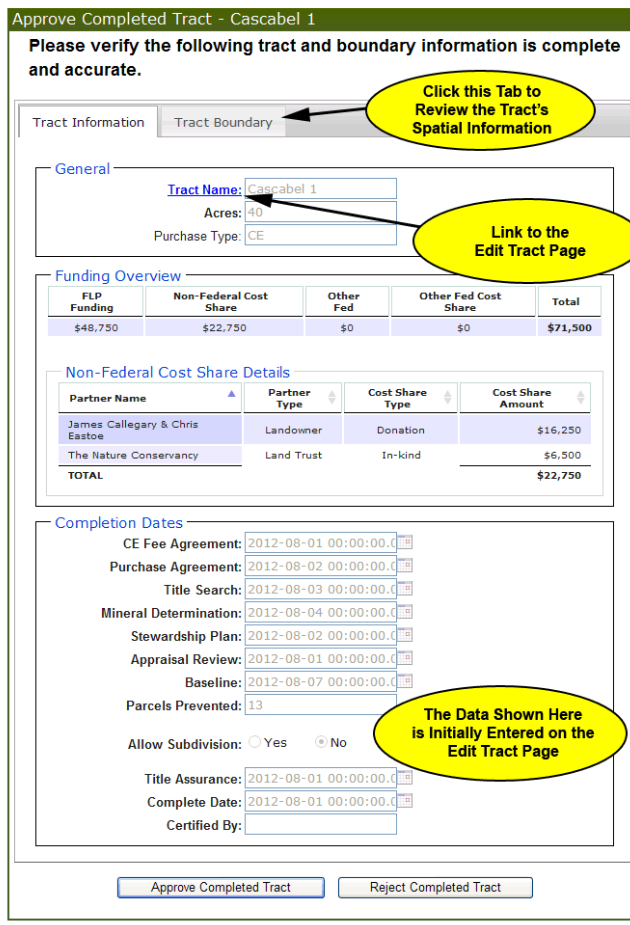


Figure 16 - the Approve Completed Tract page

6. Reports

6.1. Project Brief (Current)

The Project Brief report provides an overview of each Forest Legacy Project, as well as a summary of information about each tract associated with a project.

To access the Project Brief:

1.) From the State Homepage, select the 'Reports' link from the Quick Links menu.
    a. Alternatively, users can access the Project Brief (Current) document through the Project Menu portlet on the Edit Project page.
2.) From the Reports Menu page, select the 'Project Brief (Current)' link.
3.) Select the link for your project from the Project Brief/Select Project table.
4.) A PDF report of the Project Brief will be generated based on current information stored in FLIS2.0.

6.2. Project Brief (Archive)

The Project Brief (Archive) represents a capture of a Project's information at certain status points. As a Project advances in status, information is captured at these points: Submitted for Funding, President's Request, and Funded. The archived Project Briefs may then be used to compare current and past Project information.

To access the Project Brief (Archive):

1.) From the State Homepage, select the 'Reports' link from the Quick Links menu.
2.) From the Reports Menu page, select the 'Project Brief (Archive)' link.
3.) Select the desired brief from the list.
4.) A PDF report of the Project Brief will be generated based on archived information stored in FLIS2.0.

6.3. Project Details

The Project Details report provides a detailed report of each Forest Legacy Project, as well as detailed information about each tract associated with a project.

To access the Project Details report:

1.) From the State Homepage, select the 'Reports' link from the Quick Links menu.
    a. Alternatively, users can access the Project Brief (Current) document through the Project Menu portlet on the Edit Project page.
2.) From the Reports Menu page, select the 'Project Details' link.
3.) Select the link for your project from the "Project Details/Select Project" table.

4.) An html report of the Project Details report will be generated based on current information stored in FLIS2.0.

7. Administration

7.1. Forest Legacy Program Contacts

To access Forest Legacy Program Contact information for your state/region:

1.) Select the 'Admin' link from the Quick Links menu.
2.) Select the Forest Legacy Program Contacts' link from the Administration Menu.
3.) To edit information for a specific contact, click the link on their name; this will open the Edit Forest Legacy Program Contacts page.
4.) After all changes have been made, click the 'Save Contact' button to commit the new information to the FLIS2.0 application.

7.2. Users

To view a list of all active user accounts for your state/region and their last login information:

1.) Select the 'Admin' link from the Quick Links menu.
2.) Select the 'Users' link from the Administration Menu.
3.) You may sort the table of users by clicking on one of the table headings.

8. Frequently Asked Questions (FAQs)

QUESTION: *If I need to leave my computer, can I have my browser window open and return to FLIS later?*

ANSWER: No. When you log into the NIC Portal to access FLIS, your NIC account is assigned a session ID. This session ID exists for a finite amount of time (1 hour, 45 minutes). Once the session ID expires, you will be locked out of FLIS and the NIC Portal. To re-access FLIS, go to the NIC Portal login page (http://spfnic.fs.fed.us/nicportal/default.cfm?action=Login), re-enter your username and password and click 'Login'. Once inside the NIC Portal, click the FLIS link.

QUESTION: *Does FLIS periodically auto-save my data?*

ANSWER: No, the FLIS application does not have auto-save functionality. As a rule when using web-based applications, it is a good idea to periodically save your data. Communication line and power failures, while rare, dictate that it is good practice to save often.

QUESTION: *Can two people work on same project at same time?*

ANSWER: No. Although the FLIS application allows two people to login and make edits to the same project (or tract), if both of those people then save changes to the same project (or tract), one will overwrite the changes of the other.

QUESTION: *How do I add a new Project or Tract to the FLIS application?*

ANSWER: From a state's homepage, click the 'Projects' (or 'Tracts') link from the Quick Links menu. On the Projects (or Tracts) page, there is a portlet titled 'Project Menu' (or 'Tract Menu'). Click the 'Add Project' link (or 'Add Tract' link). This link will take you to the Add New Project (or Add New Tract) page. Enter the appropriate information (at minimum, those fields with bold type) and click the 'Save Project' (or 'Save Tract') button to save your information. Note: Users are allowed to navigate about the tabs of the Add Project and Add Tract pages without saving; however, users must click the 'Save Project' (or 'Save Tract') button before leaving the page or the data will be lost.

QUESTION: *How do I request an account to access FLIS?*

ANSWER: To access the FLIS application, you'll need a NIC Portal account. Go to the NIC Portal login page (http://spfnic.fs.fed.us/nicportal/default.cfm?action=Login) and click the 'How do I request a NIC Portal account?' link; this will open a PDF of instructions for requesting a NIC Account. When first requesting an account, it is important to remember that you must specifically request access to the application you wish to use (in this case, FLIS). Be sure not to request a permission level that is beyond your understood role (for example, if your work is limited to one state, select a state-level or organizational user role; not regional or national). Otherwise, your account request may be denied.

QUESTION*: In a table, how do I sort by multiple columns?*

ANSWER: Click the heading of one column to sort; this will [alphabetically] sort the column's information and highlight its heading. To sort by an additional column, hold down the shift key and click on a different column heading.

QUESTION: *Why is part of my text disappearing from my Importance, Strategic, Threatened or Supporting Party items?*

ANSWER: On migrating projects from FLISv1.4 to FLISv2.0, text for Important, Strategic, Threatened and Supporting Parties were moved in "as is". However, because FLIS v2.0 has size limitations for each of these fields, when you start to edit them, they are automatically truncated to the appropriate length. In order to work around this, you can use cut and paste from the main view of all items (or from the Project Details link) to edit it them in another application (e.g. Notepad, MS Word) and then cut and paste them back into FLIS.

QUESTION: *If I go to a Project's 'Edit Project Page', why can I not see the entire Project Description?*

ANSWER: If you not have edit access, *and* are using Microsoft Internet Explorer, you will not be able to scroll to see the entire Project Description. All other browsers will allow scrolling in fields where you do not have edit access. If you do not have access to a different browser, the entire Project Description can be read from the Project Details report (see section 6.3).

QUESTION: *How do I replace an existing Project's 'Detail Map' with a new map graphic?*

ANSWER: To replace the map, simply navigate to a new graphic using the 'Browse' button next to the 'Detail Map' input box. When the graphic (and its local filepath location) are in the input box, click the 'Save Project' button at the bottom of the page. This will replace the Detail Map image with the new graphic.

QUESTION: *Can I assign data-entry permissions for Projects from within the FLIS application?*

ANSWER: Yes, but if you assign data-entry permissions to a different State or Organization, those permissions will only apply to data-entry users (FLIS data-entry permissions are assigned through the NIC Portal). Read-only users will never have data-entry permissions in the FLIS application, regardless of the permission settings for a given Project.

QUESTION: *I just created a new Project or Tract, but users from outside of my state can't see it – why is the Project/Tract not visible to these users?*

ANSWER: The most likely answer is that your Project or Tract has a status of 'Draft'. For those users within your state, all 'Draft' Projects and Tracts will display and portlets, and their edit pages will be linked. However, 'Draft' Projects and Tracts cannot be viewed by users from outside your home state. Once the Project or Tract's status advances to 'Submitted for Funding' (see section 2.2), the information becomes visible to all users.

9. Glossary of Terms

Acres

The acreage of the tract that is to be protected by the Forest Legacy Program; rounded to the nearest acre. For planned acquisitions this may be estimated. At time of completion the acreage figure must match the recorded deed acreage of the land protected by Forest Legacy Program.

Appraisal (Date)

Date documenting support for the cost estimate, such as completed market analysis or preliminary appraisal. At proposal this is optional, however this date must be entered before a completion date is accepted. Additionally, this date must be before the Completion Date.

Appraisal Review (Date)

Date of the report from a qualified review appraiser that determines that the appraisal of the value of the interest being acquired meets the requirements of the FOREST LEGACY PROGRAM. (MM/DD/YYYY) This date must be entered before a completion date is accepted. Additionally this date must be before the completion date.

Baseline (Date)

Date that both the landowner and conservation easement holder have accepted the baseline documentation report as depicting the condition of the property at the time of the conveyance. This date must be entered before a completion date is accepted if acquisition is a conservation easement. This date must be equal to or before the completion date.

Complete Date

Date the Federal interest in the fee acquisition or conservation easement is finalized. That latter of either the closing date of the real estate transaction, or the date all Forest Legacy Program standards were met and the FLP program manager determines the funds can be reimbursed to the grantee if the property interest was previously acquired.

Cost Share Amount

Dollar amount of Non Federal cost share used to fund the acquisition. For project proposals round to the nearest $5,000, when completed enter actual value of cost share used. Round to the nearest whole dollar amount.

Cost Share Partner Name

Name of the agency, organization, group or other providing the cost share funds.

Cost Share Type

The type of cost share being provided, cash, donation (if landowner is donating value) or In-kind services.

Drop Date

Date determined that the tract has failed and that Forest Legacy Program funds will not be used on a tract.

Drop Reason

Brief explanation of why the project was dropped.

Easement Conditions (Date)

Date the landowner and the eligible easement holder have general agreement on conservation easement conditions.

Easement or Fee Conditions (Date)

Date the landowner and the eligible easement or FEE holder have general agreement on conservation easement or fee acquisition conditions.

Federal Designation

Designation whether lands within Forest Legacy Tracts share territory with other Federal boundaries (e.g. national forest, national park, or national wildlife refuge). These lands are eligible for the Forest Legacy Program, provided the responsible Federal agency concurs with the FLP State acquisition.

Fee Conditions (Date)

Date the landowner and the eligible FEE holder have general agreement on fee acquisition conditions.

Funding Date

Date the Federal Appropriations Bill is signed into law; if signed into law before the fiscal year the date is October 1.

Funding Fiscal Year

Proposed or actual (for funded contributions) Federal fiscal year for the Forest Legacy Program Contribution.

Funding Notes

Any notes the State wished to add regarding funding information, this information will not be displayed on the project brief.

Grant Number

A U.S. Forest Service-generated number used to uniquely identify the grant to the State, Island or Territory funding the planned acquisition.

Importance

Brief statements that focus on the attributes of the property and the environmental, social, and economic public benefits gained from the protection and management of the property and its resources. Statements reflect the ecological assets and the economic and social values conserved by the project and its level of significance. Support any claims with the source.

Interest Owner

Represents the category of the final owner of the interests to be purchased. The interest owner is the buyer in the real estate transaction. Categories are as follows: Federal, State, Other or TBD (To Be Determined).

Location

The geographic name of a town, city, county, parish, borough, etc. in which the Project is located. Where possible use a name that is in common use and approved by an authoritative body such as the U.S. Board on Geographic Names (http://geonames.usgs.gov/).

Mineral Determinations (Date)

Date that it is determined mineral rights have not been severed from the surface rights, or the date that the mineral rights have been acquired by the State and retired, or if the mineral rights have been severed the date the determination has been made that the exercise of those rights for mineral extraction is so remote as to be negligible based on factual information. At proposal this is optional this date must be entered before a completion date is accepted. Additionally, this date must be before the completion date.

Other Federal Agency Name

Name of the source of other Federal funding (if any) used to complete the FLP acquisition.

Other Federal Amount

Dollar amount of other Federal funds used in the acquisition. For project proposals, round to the nearest $5,000. When completed enter actual value of cost share used. Round to the nearest whole dollar amount.

Other Federal Cost Share Amount

Dollar amount of Federal cost share that is directed to the other Federal funds being used to fund the acquisition. For project proposals, round to the nearest $5,000. When completed enter actual value of cost share used. Round to the nearest whole dollar amount.

Other Federal Program Name

The name of the Federal program which provides funding.

Parcels Prevented

Describes the number of parcels the tract could have been divided into given current local zoning, ordinances, and other regulations if the tract was not completed. The appraisal, existing zoning regulations, and other documentable sources can be used to determine the number of potential parcels for the property at its highest and best use.

Photo Caption

Caption to be displayed with the photo on the project brief; describes what the image is portraying.

Photo Credit

Name of photographer or organization providing the photo.

President's Request

Forest Legacy Program Contribution amount that is part of the President's budget request to Congress.

Project Description

Narrative description of the project that includes important information (acres, CE or fee, etc). The description should be self-contained; during panel review, this may be the only part of the brief that is read.

Project Detail Map

Map showing how the property fits into the landscape of existing protected lands. Previously completed and funded Forest Legacy Projects must be indicated as FLP projects on the map, including name and year.

Project Photo

Photos of important environmental aspects or other unique features that help tell the story and are located on the property.

Public Access Notes

Describes why the public access designation is selected and any limitations on use of the property as well as any explanation for the public access designation. For example, if the property is open to anyone, but only hiking is the allowed use because of sensitive habitat on site, then there is “full” public access, and the “public access notes” should specify the allowed use is only hiking because of ecological concerns.

Public Access Type

Public access refers to how open the property is to the general public, but does not refer to the type of activity that is allowed. Note that public access is not a requirement of the FLP at the Federal level. Full- The property is open to the general public and will be guaranteed with language in the conservation easement. Restricted- Access to the property by the general public is limited to a specific area of the tract, a trail etc., and is specified in the conservation easement language, or recreation management plan. None – There is no guaranteed access by the public in the conservation easement language. NOTE: Access that is only allowed by landowner permission is NOT public access and should be marked as none.

Purchase Agreement (Date)

Date that signed option or purchase and sales agreement is held by the eligible CE or FEE holder or at their request if held by a third party, or the date of the request of the eligible CE or FEE holder, conservation easement or fee title that is held by a third party.

Purchase Type

Is the acquisition type: Fee-Fee Simple (land conveyances where all the rights, title and interests are acquired) or CE Conservation Easement (where partial interest in the land is conveyed by deed from a landowner to a FLP qualified CE holder with the intent of restricting present and future landowners of the property to achieve conservation objectives.)

Seller Name

If organization or corporation, the name of the landowner selling the fee or conservation easement. If the seller is an individual or family, this information is *not* to be collected.

Seller Type

The type of landowner that is selling the CE or Fee for Forest Legacy Program purposes.

SFSCC Approval (Date)

Date the tract/project is approved by state forest stewardship coordinating committee for further funding consideration; required at time of proposal.

Stewardship Plan [or Equivalent] (Date)

The latest date when the following three conditions have been met:

1. Plan preparer has completed a Forest Stewardship Plan and documented authorship of the plan

2. The landowner has acknowledged and accepted the plan for forest management activities on the property.

3. The State has accepted the Plan as meeting the goals and requirements of the States Forest Stewardship Program.

At proposal this is optional. However, this date must be entered before a completion date is accepted if acquisition is a conservation easement. Additionally, this date must be before the completion date.

Supporting Party

Name of governmental agencies, not for profit organizations, companies, and/or individuals that have demonstrated their support for the project. For a supporting party to be listed a copy of a letter of support or other documentable reference must be on file in the appropriate U.S Forest Service Region/Area/IITF office. DO NOT LIST the landowner, the State Forest Stewardship Coordinating Committee, the U.S. Forest Service State and Private Forestry, or the State Lead Agency as a supporting party.

Strategic

Statements describing how the project fits within a larger conservation plan, strategy, and initiatives and enhances previous conservation investments. Statements reflect on the project's relevance or relationship to conservation efforts on a broader perspective.

Threatened

Brief statements describing and supporting the likelihood for conversion of the forest to non-forest. Describe the legal environment and situational issues that lead the tract toward conversion, not what will be lost if conversion occurs. Support any claims with sources.

Title Search (Date)

Date that clear title search has been completed and when the land is not encumbered by any other mechanism that makes the property ineligible for Forest Legacy funds. At proposal this is optional. However, this date must be entered before a completion date is accepted. Additionally, this date must be before the completion date.

Tract Name

Descriptive name based on a feature or recognized location near the tract. The landowner’s name must not be used (in order to preserve their anonymity).

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